

## CALIFORNIA ENERGY COMMISSION

1516 NINTH STREET  
SACRAMENTO, CA 95814-5512  
www.energy.ca.gov



March 2, 2005

TO: INTERESTED PARTIES

SUBJECT: REQUEST FOR PROPOSALS (RFP) #600-04-605,  
ADDENDUM NO. 1 (AD-1)  
NON-PETROLEUM TECHNICAL ASSISTANCE

**Notice is Hereby Given That The Above RFP Is Amended As Follows**

**Section II, Work Statement and Deliverables, pages 14 through 20, are amended as follows:**

“Replace Section II, Work Statement, pages 14 through 21, with the attached revised pages, dated March 2, 2005.”

Attached are the most significant questions and answers presented at the Bidder's Conference and received in writing, and a list of conference attendees. Please remember that all Disabled Veteran Business Enterprise Participation Goals or Good Faith Efforts must be met. In order to comply with the Disabled Veteran Good Faith Efforts compliance, the deadline to place an ad is **March 4, 2004**.

All further questions regarding this RFP must be administrative only and directed to the Contract Officer. To ensure timely delivery, technical and cost proposals must be delivered in separately sealed packages to the Energy Commission with your company name on the outside and identified as RFP #600-04-605. **Proposals must be delivered no later than 5:00 PM, March 18, 2005, to the Energy Commission Contracts Office.**

Except as herein amended, all other terms and conditions shall remain the same.

Sincerely,

Elizabeth Stone  
Contract Officer

Attachments

# REQUEST FOR PROPOSALS

## NON-PETROLEUM

## TECHNICAL ASSISTANCE



RFP #600-04-605  
State of California  
California Energy Commission  
[March](#) January 2005

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### **Attachments**

1	Contractor Status Form
2.1	Small Business/Disabled Veteran Business Enterprise Certification Application Instructions
2.2	Disabled Veteran Business Enterprise Program Requirements
3	Contractor Certification Clauses
4	Customer References
5	Standard Agreement Example

# **I. Introduction**

## **BACKGROUND**

Pursuant to California Public Resources Code sections 25004.3 and 25690.5, it's the policy of the state to provide financial assistance to California companies, particularly in small businesses that are engaged in commercial efforts in the field of advanced transportation technologies. Technical assistance, review and quality control shall also be provided for energy technologies, research, development, and demonstration projects.

In response to the public's concerns about price volatility, supply shortages, and the frequency of refinery outages, the California Legislature passed Assembly Bill 2076 in 2000 (AB 2076, Shelley, Chapter 936, Statutes of 2000). This bill directed the Energy Commission (Commission) and the California Air Resources Board (CARB) to develop and adopt recommendations for the Governor and the Legislature on a California strategy to reduce petroleum dependence.

As a result of meetings held between Commission staff and non-petroleum fuel/technology stakeholders, barriers were identified that impede the success of vehicle and infrastructure projects the Commission either co-funds or administers. Based on this information, Commission staff held a Contract Opportunity Workshop on October 22, 2004, to explore the previously identified barriers and seek comments on potential tasks that could overcome those same barriers.

Accordingly, the Commission is releasing this Request for Proposals (RFP) for technical assistance in overcoming identified barriers.

## **WHAT IS THE PURPOSE OF THIS RFP?**

The purpose of this Request for Proposal (RFP) is to select a contractor or team of contractors to perform specific technical assistance tasks for Commission funded non-petroleum vehicle and infrastructure projects. Potential Bidders may bid on one or more of the identified tasks in this RFP. The following tasks need to be performed:

- Task 1     Engineering/construction project trouble shooting consultations
- Task 2     Development of financial and technical/business handbooks
- Task 3     Business/team facilitation
  - Business/financial management consultations
- Task 4     Project cash flow analysis
- Task 5     Conference/workshop facilitation
- Task 6     Conduct surveys
  - Identify new barriers and verify progress to overcome existing barriers
  - Characterize niche market opportunities

Only proposals from Bidders with significant verifiable technical experience and credentials in the above-mentioned areas will be considered for technical merit review.

## **I. INTRODUCTION, CONTINUED**

### **HOW IS THIS RFP ORGANIZED?**

This RFP is organized into the following five sections:

- Section I Provides a summary and administrative overview of the RFP Requirements.
- Section II Explains the work to be accomplished, including deliverables and due dates.
- Section III Explains the format, documents and technical expertise needed to submit a successful proposal.
- Section IV Provides administrative detail, including legal requirements of the RFP.
- Section V Explains the evaluation process.

### **HOW MUCH FUNDING IS AVAILABLE?**

There is a maximum of up to \$240,000 available for the contract(s) resulting from this RFP. Of this amount, \$30,000 is immediately available and the remaining balance, \$210,000, may be available for fiscal years 2005-2006, 2006-2007. **Each Bidder may bid on individual task(s) or on the entire RFP.** The contract award(s) will be made to the responsible Bidder(s) with the lowest total cost from proposals that pass the technical review. This is an hourly rate plus cost reimbursement contract with a ceiling on the total contract amount. The Commission reserves the right to increase or decrease the amount of any contract as needed to meet budget program requirements.

Funding for this RFP comes from fiscal years 2004-2005, 2005-2006 and 2006-2007, and is subject to appropriations from the Governor's 2005-2005, 2005-2006 and 2006-2007 budgets. Of the remaining \$210,000 balance, partial funding of \$130,000 is dependent upon acquiring funding from federal agencies. In the event that funds are not available from the federal or California governments, the Commission shall have no further liability with regard to the agreement(s).

The Commission reserves the right to reduce the amount of the 2005-2006 and 2006-2007 funding to an amount deemed appropriate in the event the budgeted funds do not provide full funding of Commission contracts. In this event, the Contractor and Commission Contract Manager shall meet and reach agreement on a reduced scope of work commensurate with the level of available funding.

### **WHAT ARE THE KEY ACTIVITIES AND DATES?**

Key activities and times for this RFP are presented below. This is a tentative schedule, please call the Contracts Office to confirm dates.

<b>ACTIVITY</b>	<b>ACTION DATE</b>
RFP Release	February 2, 2005
Deadline for Written Questions	February 15, 2005
Pre-Bid Conference	February 15, 2005
Distribute Questions/Answers and Addenda (if	

## **I. INTRODUCTION, CONTINUED**

any) to RFP	February 25, 2005
Deadline to Submit Proposals	March 18, 2005
Interviews (mandatory)	April 5-7, 2005
Notice of Proposed Award	April 14, 2005
Commission Business Meeting	June 8, 2005
Contract Start Date	June 30, 2005
Contraction Termination Date	March 31, 2008

### **HOW DO I RESPOND TO THIS RFP?**

Responses to this solicitation shall be in the form of a Technical and Cost Proposal according to the format described in Section III. The Technical Proposal shall document the Bidder's experience, qualifications, project organization and approach to perform the tasks described in the Work Statement found in Section II, and the Cost Proposal shall detail the Bidder's budget to perform such tasks.

### **HOW CAN I OBTAIN FURTHER INFORMATION?**

A Pre-Bid Conference will be held to answer questions. Please call (916) 654-4392 to confirm the time and date. Bidders are encouraged to attend this informational meeting:

**Tuesday, February 15, 2005, 10:00 a.m.**  
**California Energy Commission**  
**1516 9<sup>th</sup> Street, Hearing Rm. B**  
**Sacramento, California 95814**

Potential Bidders may ask questions about the requirements of this RFP. Bidders must prepare their questions in writing and send or FAX them to the Contact Person (see Who Do I Contact?). At the option of the Commission, questions may be answered orally at the Pre-Bid Conference or in writing. All questions will be answered in writing and will be distributed to recipients of this RFP sometime after the Pre-Proposal Conference and posted on the Commission's Web Site at [www.energy.ca.gov](http://www.energy.ca.gov). Deadline for written questions is February 15, 2005, by 5:00 p.m.

### **WHO DO I CONTACT?**

Questions or clarifications about this RFP should be directed to:

ELIZABETH STONE, CONTRACT OFFICER  
California Energy Commission  
1516 Ninth Street, MS-18  
Sacramento, California 95814  
Telephone: (916) 654-5125  
FAX: (916) 654-4423



## **I. INTRODUCTION, CONTINUED**

This RFP is available through the Commission's Website at:  
[www.energy.ca.gov/contracts](http://www.energy.ca.gov/contracts). Copies may be obtained by writing or calling:

California Energy Commission  
1516 Ninth Street, MS-18  
Sacramento, California 95814  
Telephone: (916) 654-4392  
FAX: (916) 654-4423

### **Verbal Communication**

Any verbal communication with a Commission employee concerning this RFP is not binding on the State or the Commission and shall in no way alter a specification, term, or condition of the RFP.

## **WHAT ARE MY RESPONSIBILITIES FOR SUBMITTING A PROPOSAL?**

Bidders are responsible for:

- Carefully reading this entire RFP;
- Asking the appropriate questions in a timely manner;
- Submitting all required responses in a complete manner by the required date and time;
- Making sure that all procedures and requirements of the RFP are followed and appropriately addressed
- Carefully reread the entire RFP before submitting a proposal.

## **II. Work Statement and Deliverables**

### **ABOUT THIS SECTION**

This section describes the contract work statement including the tasks the winning Bidder(s) (“Contractor(s)”) will be asked to perform under the direction of the Commission Contract Manager.

### **BACKGROUND**

California Public Resources Code sections 25004.3 directs the state to provide financial assistance to California companies, particularly in small businesses that are engaged in commercial efforts in the field of advanced transportation technologies.

In addition, beginning July 1, 1985, and every year thereafter, the California Public Resources Code section 25690.5 provides that the Commission shall provide technical assistance, review and quality control of funded projects shall be provided for energy technologies, research, development, and demonstration projects.

In response to the public’s concerns about price volatility, supply shortages, and the frequency of refinery outages, the California Legislature passed Assembly Bill 2076 in 2000 (AB 2076, Shelley, Chapter 936, Statutes of 2000). This bill directed the Commission and the California Air Resources Board (CARB) to develop and adopt recommendations for the Governor and the Legislature on a California strategy to reduce petroleum dependence.

The Commission and the CARB worked together to hold public workshops and meetings with representatives of the oil industry, natural gas industry, the ethanol industry, diesel engine industry, and environmental groups. After meeting with the above stakeholders, Commission staff evaluated the following fuel options:

- Natural gas used in gasoline and diesel-like engines;
- Ethanol blends;
- Liquefied petroleum gas (LPG);
- Gas-to-liquid diesel;
- Electric vehicles;
- Fuel cell vehicles; and
- Biodiesel

Based on the meetings with these stakeholder groups and analyses of the above referenced fuels, Commission staff concluded that the use of non-petroleum fuels could provide a significant reduction in petroleum use as a mid-term option if fully implemented in the 2010-2020 timeframe. In addition, stakeholder groups have identified barriers that impede the use of non-petroleum fuels and technologies in California’s transportation market. Stakeholders recommended that the Commission provide permit assistance, identify investment sources, facilitate the introduction of non-petroleum fuels and technologies into market niches, and support information outreach programs.

## **II. WORK STATEMENT AND DELIVERABLES, CONTINUED**

A Contract Opportunity Workshop was held on October 22, 2004, to seek comments and suggestions on ways to overcome barriers that needed to be addressed in Commission funded projects.

Input was requested on the types of barriers, the tasks that would address those barriers and the cost for each task. The following is a list of potential tasks that were discussed:

- Task 1     Engineering/construction project trouble shooting consultations
- Task 2     Development of financial and technical/business handbooks
  - How to secure funding
  - Key Ingredients to success
- Task 3     Business/team facilitation
  - Business/financial management consultations
- Task 4     Transportation technology cash flow analysis model
- Task 5     Conference/workshop facilitation
- Task 6     Conduct surveys
  - Identify new barriers and verify progress to overcome existing barriers
  - Characterize niche market opportunities

Based on our discussions, Commission staff determined it was necessary to hire one or more contractors to provide technical assistance. This technical assistance will consist of consultations to address project-specific barriers and to work with Commission staff in resolving infrastructure project issues. The contract team will include engineering, project construction, and financing specialists.

### **WILL TRAVEL BE REQUIRED?**

Travel will be necessary to complete some of the tasks. Travel expenses incurred will be reimbursed at no more than the State per diem rates for non-represented State employees, and must be included in the Bidder's cost. Receipts for lodging are required and subject to the Commission Contract Manager's approval.

### **GENERAL REQUIREMENTS**

The purpose of this RFP is to select a contractor or team of contractors to perform technical assistance tasks for Commission funded non-petroleum vehicle and infrastructure projects.

All tasks will be performed in response to Work Authorizations issued by the Commission Contract Manager and will be carefully coordinated with current or available support resources.

The Commission Contract Manager will direct the Contractor(s) and/or subcontractors. The Contractor(s) may manage a contractor team capable of undertaking all work assignments identified in this Work Statement. In all cases, the Contractor(s) must establish all necessary contractual relationships with all subcontractors and reimburse all subcontractors for services performed. The technical performance of the subcontractors shall be monitored by the

## **II. WORK STATEMENT AND DELIVERABLES, CONTINUED**

Contractor(s) to the extent required by the Commission's Contract Manager on a case-by-case basis.

The Contractor(s) and/or subcontractors shall begin task work only after receiving a written Work Authorization to do so by the Commission Contract Manager. The specific task and the degree of effort for each task to be performed by the Contractor(s) or subcontractors will vary from project to project. All project work performed by the contractor team shall be directed by and coordinated with Commission staff as designated by the Commission Contract Manager. The actual costs of a completed, approved Work Authorization shall not exceed the authorized amount. If, in the performance of the work, the Contractor determines that the actual costs will exceed the estimated costs, the Contractor shall immediately notify the Commission Contract Manager.

Any expenses incurred by the Contractor that have not been duly authorized by the Commission Contract Manager shall be borne by the Contractor. No amendments to the Work Authorization shall be made for work undertaken without the specific, written approval of the Commission Contract Manager.

Timely response to specific Commission needs on short notice will be characteristic of some tasks. Identified subcontractor management and staff will be required to be available to the Commission Contract Manager within twenty-four (24) hours of initial contact or submission of a Work Authorization to the Contractor.

### **Contract Management<sup>1</sup>**

The Contractor(s) shall:

- Respond to requests or direction from the Commission's Contract Manager in a timely fashion.
- Manage the completion of all tasks under the Contract as agreed between the Contractor and the Commission's Contract Manager.
- Provide oversight and first-level review of reports and documentation, and comment on the content of products from the contractor team, as requested by the Commission's Contract Manager on a case-by-case basis.
- Develop project schedules and assign work to the contractor team to ensure that tasks are completed efficiently, on schedule, and within the budget as agreed between the Contractor and the Commission project manager in the Work Authorization.
- At the request of the Commission's Contract Manager, the Contractor and subcontractors shall be available for meetings or provide written and/or verbal briefings to the Commission's staff or others. The cost of meetings will be included in each Work

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<sup>1</sup> Contract Management duties are required for all tasks.

## **II. WORK STATEMENT AND DELIVERABLES, CONTINUED**

Authorization. The cost of meetings requested specifically by the Contractor will be borne solely by the Contractor.

### **Work Authorizations**

This is a "work authorization" Contract and no work shall be undertaken unless authorized by the Commission through a specific written document called a work authorization. The Commission Contract Manager shall prepare a Work Authorization for each item of work. Each Work Authorization shall state:

- Contract Number, Task Number, and Work Authorization Number (to be assigned by Commission Contract Manager)
- Purpose, objective, or goal to be undertaken
- Description (work statement) of the work to be accomplished
- Schedule and Deliverables (including any significant material to be developed and delivered and due dates for each)
- Identification of the contractor/subcontractor team
- Start/End Dates for the Work Authorization
- Contractor's person hours and billing rates
- Subcontractor Amount (if any)
- Any fees (G&A, ODC, etc.)
- Total cost of the Work Authorization

### **Subcontractors**

In the event subcontractors are part of the contractor's proposal, the Contractor shall manage and coordinate subcontractor activities. The Contractor is responsible for the quality of all subcontractor work and the Commission will assign all work to the Contractor. When new subcontractors are hired or added, the Contractor shall provide the Commission with updated Disabled Veteran Owned Business Enterprise (DVBE) forms.

Any subcontractor whose work within the proposal would be essential to completion of the tasks in this agreement not part of this RFP must be identified as a key subcontractor and identified specifically in the proposal. Unless given specific written permission to the contrary, any change in the assignment of key subcontractors after the award of the contract may be deemed a breach in the agreement by the Energy Commission and may result in the termination of the agreement.

The Contractor will work directly with and report to the Commission's Contract Manager on contract status and subcontractor work assignments and progress. Contractor will coordinate subcontractor accessibility to the Commission's Contract Manager.

The Contractor shall require subcontractors to provide invoices that correctly identify expenses charged to each contract task. The Contractor shall also provide subcontractor invoices for invoice payments, showing funds authorized, invoices submitted, and status.

## **II. WORK STATEMENT AND DELIVERABLES, CONTINUED**

The Contractor shall require subcontractors to copy the Commission's Contract Manager with all final, approved work statement deliverables. All work statement deliverables from the contractor team must be submitted as drafts for review and comment to the Commission Contract Manager.

### **Invoices**

The contractor shall prepare an invoice for all contract expenses performed. The official invoice is to be submitted to the Commission's Accounting Office. The Commission's contract manager will specify the invoice format. All contractor invoices must identify charges by task.

### **Monthly Progress Reports**

The Contractor shall provide monthly progress reports which summarize all contract activities conducted by the Contractor including contract expenditures to date. The progress report is due to the Commission Contract Manager within 15 days after the end of the month and each progress report shall coincide with the invoice period. The Commission Contract Manager will specify the report format and the number of copies to be submitted. The Contractor shall submit monthly progress reports to the Commission Contract Manager which describe:

Monthly progress in each task

The degree of completion for each task

Current and cumulative budget expenditure by task

Cumulative contract expenditures

Variance from planned expenditure schedule

Status of deliverables

DVBE contract expenditures

Problems, and other information requested by the Commission Contract Manager

The Commission Contract Manager will specify the report format and the number of copies to be submitted. All monthly progress reports will coincide with the invoice period.

### **Final Report and Final Meeting**

The Contractor shall prepare a draft final report that includes Tasks 1 through Task 6. The final report shall be submitted in draft form to the Commission Contract Manager for review and approval. The Contractor shall review recommendations for changes to the report with the Commission Contract Manager and incorporate the agreed-upon changes into the final version of the report. The Contractor shall meet with the Commission to present the findings, conclusions, and recommendations prior to the due date of the final technical report.

After approval of the final report by the Commission Contract Manager, the Contractor shall deliver, two bound paper copies, and one unbound paper copy of the report to the Commission Contract Manager. The unbound copy shall be single sided and camera ready, with graphics that are readable after photocopying. The contractor shall deliver an electronic copy (CD ROM) of full study text in Microsoft Word <sup>TM</sup> (version 97).

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

**Meeting** - Contractor shall meet with the Commission Contract Manager to present the findings, conclusions, and recommendations. Both the final meeting and the Final Report must occur on or before the ending term of this Agreement.

- 1) **Abstracts** - Contractor shall provide a brief (200 words or less) factual abstract of the most significant information contained in the report.
- 2) **Summary** - The summary shall include a statement of the problem, methods or techniques used to solve the problem, conclusions and any additional follow-up or ongoing recommendations. The summary shall be prepared in language and structure easily understood by members of the public who may have limited technical background.
- 3) **Format**--Final reports and summaries shall be prepared in the following manner:
  - ☐ Camera-ready originals, in black ink, which include originals of oversize material, and two copies.
  - ☐ Illustrations and graphs sized to 8 1/2 x 11 page.
  - ☐ Contractor's name shall only appear on the cover and title page as follows:

California Energy Commission  
Project Title  
Contract Number  
By (Contractor)

The following are the six tasks that need to be performed as part of this RFP. Each task can be bid individually or all the tasks can be bid on as one unit, in one proposal.

- Task 1. Engineering/construction project trouble shooting consultations.
- Task 2. Development of financial and technical/business handbooks.
  - How to secure funding
  - Key Ingredients to success
- Task 3. Business/team facilitation
  - Business/financial management consultations.
- Task 4. Transportation technology cash flow analysis model
- Task 5. Conferences/workshop facilitation
- Task 6. Conduct surveys
  - Identify new barriers and verify progress to overcome existing barriers
  - Characterize market niche opportunities.

The selected Contractor(s) shall provide technical support services subject to the supervision and direction of the Commission Contract Manager for this task area. The scope of work will be identified and defined by the Contract Manager and all work shall be performed under an approved work authorization. The following is the budget for the proposed tasks:

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

Task	Current		Anticipated		Anticipated		Total
	FY 2004-05		FY 2005-06		FY 2006-07		
	State	Federal	State	Federal	State	Federal	
1. Trouble Shooting Consultations	\$30,000	-0-	-0-	\$15,000	-0-	\$15,000	\$ 60,000
2. Develop Financial and Technical Business Handbooks	-0-	-0-	\$12,000	\$24,000	-0-	-0-	\$ 36,000
3. Business Team Facilitation	-0-	-0-	\$ 9,000	\$ 9,000	\$ 6,000	-0-	\$ 24,000
4. Transportation Technology Cash Flow Model	-0-	-0-	\$28,000	\$21,000	\$ 9,000	-0-	\$ 58,000
5. Conference/Workshop Facilitation	-0-	-0-	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 8,000
6. Conduct Surveys	-0-	-0-	-0-	-0-	\$12,000	\$42,000	\$ 54,000
Grand Total	\$30,000	-0-	\$51,000	\$71,000	\$29,000	\$59,000	\$240,000

### TASK 1: PROJECT TROUBLE SHOOTING CONSULTATIONS

Commission staff encounter a variety of technical problems that impede the completion or operation of Commission contracts involving non-petroleum fuel infrastructure and vehicle projects. The Contractor shall trouble shoot assignments to evaluate problems, suggest solutions and possibly participate in remedial actions to solve problems associated with Commission contracts and grants as selected by Commission staff. The Contractor shall participate in consultation meetings organized by Commission staff including contractors, clients and possible funding partners.

The Contractor shall assist Commission staff by evaluating and consulting 40 specific non-petroleum fuel infrastructure projects located at public and private fueling locations over three years ([20 for the first year and 20 for the second year](#)). For this task, \$30,000 from the Energy Resources Program Account (ERPA) has been allocated in the Fiscal Year 2004-05 budget to fund 20 project evaluations. An additional \$30,000 from federal sources is anticipated, beginning in FY 2005-06, to fund 20 additional project consultations. All of these projects will be located in California, of which 60 percent are anticipated in Southern California.

Priority will be given to designated projects that the Commission has either funded or are administered through federally funded, special energy project grants. Projects may include compressed natural gas, liquefied natural gas, liquefied petroleum gas, ethanol, biodiesel, gas-to-liquid diesel and hydrogen facilities and vehicles.



## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

Each evaluation and consultation may include:

- 1.1 Assisting with projects that are having permit difficulties.
- 1.2 Assisting with projects where funding is near expiration or already has expired.
- 1.3 Assisting with projects that are having technical problems during construction.
- 1.4 Assisting with projects that are having operational difficulties.
- 1.5 Evaluating operational alternative fuel dispensing systems identified by the Commission Contract Manager. These site assessments may include the following:
  - ◇ Type of system
  - ◇ Facility manager interview
  - ◇ Monitoring system in-use
  - ◇ Fuel Access System (EPOS)
  - ◇ System flow-rate
  - ◇ Number of anchor fleet vehicles fueled daily/ average daily fuel volume dispensed
  - ◇ Other participating fleets utilizing the facility/ average daily fuel volume dispensed
  - ◇ Type of maintenance support (Maintenance contract, in house, etc.)
  - ◇ System downtime/reliability assessment
  - ◇ Fuel contamination problems
  - ◇ System training (manual, classroom, video, etc.)
  - ◇ Overall facility assessment
  - ◇ Other technical problem assessments
  - ◇ Written report with recommended actions
- 1.6 Contract Management

### TASK 2: DEVELOP FINANCIAL AND TECHNICAL BUSINESS HANDBOOKS

To fulfill California's goals to stimulate the development and use of non-petroleum transportation infrastructure and vehicles, the Commission plans to increase the awareness of the positive attributes associated with using non-petroleum fuels in transportation applications. The Contractor shall develop for the Commission two handbooks to highlight successful projects, identify potential pitfalls impeding progress, and educate government officials, market niche consumers and "New to Market" equipment manufacturers, fuel suppliers and developers about attributes and costs. One handbook shall address the needs of the non-petroleum transportation technology/fuel industry. A second handbook will address the needs of market niche consumers. These handbooks will be published by the Commission for distribution.

Working closely with the Commission Contract Manager, the Contractor shall conduct research and analysis to write the two handbooks that are related to non-petroleum fuels in transportation applications. The Commission anticipates each handbook to be in two colors, perfect bound, #80 cover with graphics and a glazed matte finish. The Contractor shall propose at least two cover designs for each handbook for consideration by the Commission Contract Manager. Each handbook shall include 25-50 pages, #24 of black and white text, graphics and tables and the

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

trim size will be 8 ½ x 11. The final design will be approved by the Commission Contract Manager.

Working closely with the Commission Contract Manager, the Contractor shall prepare graphics, charts and photographs, typesetting, layout and paste-up. In consultation with the Contractor, the Contract Manager will determine and approve the final number of charts, graphs and photographs.

The Contractor shall develop the brochures using PageMaker software or other software agreed to by the Contract Manager. The Contractor shall print 1,000 copies of each handbook. The Commission Contract Manager will be responsible for proofing and approving the final text of the brochures prior to printing. The two handbooks shall be developed in separate fiscal years, but can be printed simultaneously.

For this task, \$12,000 from the ERPA will be proposed in the FY 2005-06 budget to fund the non-petroleum industry handbook. An additional \$24,000 from federal sources is anticipated in FY 2005-06 to fund the market niche consumer handbook. The Contractor shall be responsible for printing each handbook. The Contractor shall assist Commission staff with the following:

- Task 2.1 Determining handbook topics
- Task 2.2 Researching topics
- Task 2.3 Composing the following:
  - Introductions
  - Purpose and Overviews
  - Text
- Task 2.4 Developing applicable tables, graphics, etc.
- Task 2.5 Developing a glossary for each handbook
- Task 2.6 Assisting in developing ~~handbook~~ covers for each handbook
- Task 2.7 Printing each handbook
- Task 2.8 Contract Management

### TASK 3: BUSINESS/TEAM FACILITATION

During the planning, construction and operation phases of non-petroleum fuel/technology projects, non-petroleum fuel infrastructure/vehicle project team members and Commission staff periodically experience business and financial constraints that impede project progress. For example, Contractors selected under this RFP will be assigned to projects facing these types of problems. Contractor(s) will evaluate barriers, suggest solutions and possibly participate in remedial actions. The Commission staff will organize consultation meetings to include the contractor(s), clients and possible funding partners.

During the first year of the contract, t~~The Contractor shall provide twelve (12) project consultations services and reports on team development, market planning investments, infrastructure project locations, siste funding, and/or project cash flow analysis. to assist sixteen non-petroleum fuel infrastructure/vehicle project teams to address business and financial problems impeding the development of successful projects.~~ During the second year of the contract, the Contractor shall provide four (4) consultations and reports on team development,

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

[market planning investments, infrastructure project locations, siste funding, and/or project cash flow analysis.](#) For this task, \$9,000 from the ERPA will be proposed in the FY 2005-06 budget to fund six project consultations. In addition, \$6,000 from the ERPA will be proposed in FY 2006-07 to fund four additional project consultations. An additional \$9,000 from federal sources is anticipated in FY 2005-06 to fund six additional project consultations. The Commission will begin this activity in Fiscal Year 2005-06.

The Contractor shall provide business/consultant services in the following areas:

- Task 3.1 Assist and support Commission funded project team members with team development in the event of corporate mergers or management changes to avoid site closures or suspension.
- Task 3.2 Assist in the development of market plans and investment prospectus.
- Task 3.3 Consult with infrastructure owners on optimal project locations to support non-petroleum fueled vehicles.
- Task 3.4 Assist prospective non-petroleum fuel site owners by identifying funding sources.
- Task 3.5 Provide cash flow analysis for project proposals.
- Task 3.6 Contract Management

### TASK 4: TRANSPORTATION TECHNOLOGY CASH FLOW ANALYSIS-MODEL

Financial investors, as well as project developers, use cash flow spreadsheets or interactive models to estimate return on investment, capital and operating cash needs and the financial status of existing and proposed projects. Furthermore, cash flow analysis provides information to determine incentives or subsidies needed to stimulate new investments in non-petroleum fuel/technology projects. Commission staff plans to develop a cash flow model addressing non-petroleum transportation infrastructure projects.

The Contractor selected under this RFP will develop, test and enhance an excel based cash flow model for Commission staff use and make it available for Commission clients. [The Contractor shall provide training for the cash flow model to Commission staff and Commission clients.](#) In exchange for this model development work, contractor shall grant the Commission lifetime rights in model upgrades. In addition, the contractor shall offer upgrades to other clients for a nominal fee to be negotiated between the Contractor and the Commission staff.

For this task, \$28,000 from the ERPA will be proposed in FY 2005-06 budget to fund the model development, testing, and training of Commission staff. In addition, \$9,000 from ERPA will be proposed in FY 2006-07 to provide client training. An additional \$21,000 from federal sources is anticipated in FY 2005-06 to fund model upgrades.

- 4.1 The Contractor shall develop an excel based model to evaluate the cash flow performance of existing and proposed transportation technology projects. The model shall permit users to evaluate the following:
  - Investment options for private and public sector investors
  - Project feasibility
  - Project cost-effectiveness
  - Sensitivity of various investment options
  - Project outcomes under the various investment options and financing structures

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

The model shall be developed to include, but not limited to the following inputs:

- Capital cost
- Operating costs
- Options for treating tax implications of a non-petroleum fuel transportation infrastructure investments
- Depreciation of hardware used to implement the transportation non-petroleum fuel technology
- Optional fuels to be used with the technology, such as gasoline, diesel, natural gas, or biodiesel.

The model shall be developed to have the following output:

- Annual projected cash flow analysis showing cost and benefits over the project life
- Summary of project cash flow analysis showing cost and benefits

4.2 Model Enhancement: The contractor shall complete a model enhancement using data from actual projects collected by Commission staff and covering six non-petroleum fuel/technology categories:

- Compressed natural gas/ liquefied natural gas
- Propane
- Gas-to-liquid diesel
- Biodiesel
- Ethanol
- Hydrogen and electric drive train.

4.3 Training and Support: The contractor shall provide training and support to [Commission staff and Commission clients](#) for the use of the model for three years.

4.4 Contract Management

### TASK 5 CONFERENCE/WORKSHOP FACILITATION

The Commission plans to conduct [two \(2\)](#) annual conferences featuring successful non-petroleum transportation fuel/technology projects. Commission staff will organize the conference, select sites and fund conference direct costs from its operating budget. [The Contractor shall participate in and provide a report for each conference as well as assist in the recruitment of conference speakers and topics of discussion.](#) This activity will be focused on a different topic annually. Potential topics include:

- The development of niche markets, (i.e. taxi fleets, trash haulers, street sweepers, etc.).
- The facilitation of business relationships between niche markets and consumers.
- A proactive approach to project trouble shooting.

## **II. WORK STATEMENT AND DELIVERABLES, CONTINUED**

For this task, \$2,000 from the ERPA will be proposed in both the FY 2005-06 and 2006-07 budgets for each annual conference. In addition, \$4,000 from federal sources is anticipated, beginning in FY 2005-06 to supplement the contractor task.

The contractor shall conduct the following tasks for two conferences:

- 5.1 Assist in formulating topic areas and conference content
- 5.2 Recruiting keynote speakers with experience in non-petroleum fuels for annual conferences
- 5.3 Recruiting additional conference speakers with experience in the related topic areas for breakout sessions
- 5.4 Participating in the conferences
- 5.5 Contract Management

### **TASK 6 CONDUCT SURVEYS**

Every two years, the Commission develops an Energy Report to the Governor and Legislature to identify trends, evaluate issues and recommend new initiatives. This report may stimulate new legislation, executive orders, policies and programs. The Energy Report includes analysis of efforts to fulfill petroleum reduction goals and stimulate non-petroleum transportation fuel technologies. The Commission staff plans to conduct a survey of transportation industry representatives and surveys of market niche consumers and include results in the 2007 Energy Report. The Commission staff will identify conceptual questions and manage a process to recruit survey participants. [The Contractor shall develop a questionnaire, test, provide an analysis report, and present the results at the annual conference.](#)

For this task, \$12,000 from the ERPA will be proposed in FY 2006-07 to fund the transportation industry survey. An additional \$42,000 from federal sources is anticipated, beginning in FY 2006-07, to fund the market niche consumer surveys.

- 6.1 The Contractor shall develop a questionnaire and recommend survey methods to address the following:
  - Niche market opportunities
  - Niche market penetration
  - Vehicle and infrastructure performance
  - Customer satisfaction
  - Customer Motivation
  - Identify barriers and verify progress to overcome existing market barriers
  - Capital investment requirements
- 6.2 The contractor shall test and possibly re-test the survey with a selected survey cohort.
- 6.3 The contractor shall compile survey results and complete a written/graphic report.
- 6.4 The contractor shall present results to the Commission staff and a conference audience.
- 6.5 Contract Management

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

### Deliverables and Due Dates

Task Area Description		Due Date
<u><a href="#">TASK 1 - The Contractor shall provide a total of 20 consultations during July 2005 through June 2006 and 20 consultations during July 2006 through June 2007.</a></u>		
1.1	Report detailing the consultation and permit recommendations.	30 days from the date of the consultation
1.2	Report detailing consultation and recommended funding assistance.	30 days from the date of the consultation
1.3	Report detailing type of construction assistance consultation.	30 days from the date of the consultation
1.4	Report detailing type of operational difficulty and recommendations.	30 days from the date of the consultation
1.5	Report detailing site inspected including all criteria listed under site assessment.	60 days from the date of the site assessment
1.6	Contract Management <ul style="list-style-type: none"> <li>Progress Reports</li> <li>Final Report</li> </ul>	Monthly <u><a href="#">February 2008</a></u>
<u><a href="#">TASK 2 - The Contractor shall develop two handbooks, one for the Non Petroleum Transportation Industry and one for Market Niche Consumers. Both are to be developed October 2005 through February 2006.</a></u>		
2.1	Determine handbook topic	
2.2	Researching topic(s)	
2.3	Composing the following: <ul style="list-style-type: none"> <li>Introduction</li> <li>Purpose and Overview</li> <li>Text</li> </ul>	
2.4	Develop applicable tables, graphics, etc.	
2.5	Developing a glossary	
2.6	Assisting in developing handbook cover	
2.7	Printing	
2.8	Contract Management <ul style="list-style-type: none"> <li>Progress Reports</li> <li>Final Report</li> </ul>	Monthly <u><a href="#">February 2008</a></u>
<u><a href="#">TASK 3 - The Contractor shall conduct a total of sixteen consultations and reports, 12 during the first year, October 2005 to September 2006, and four (4) during the second year, October 2006 to September 2007.</a></u>		
3.1	Report detailing consultation and recommendations on team development.	30 days from the date of the consultation
3.2	Report detailing the recommendations of non-petroleum market planning and investment.	March 2007
3.3	Report detailing non-petroleum infrastructure project locations.	30 days from the date of the consultation
3.4	Report detailing non-petroleum fuel site funding assistance.	30 days from the date of the consultation
3.5	Report detailing non-petroleum fuel project cash flow analysis	30 days from the date of the consultation
3.6	Contract Management	

## II. WORK STATEMENT AND DELIVERABLES, CONTINUED

<ul style="list-style-type: none"> <li>Progress Reports</li> <li>Final Report</li> </ul>	Monthly <a href="#">February 2008</a>
<b>TASK 4</b>	
4.1 Draft transportation cash flow model	December 2006
4.2 <a href="#">Develop, test</a> Enhanced transportation technology cash flow model	December 2007
4.3 <a href="#">Provide Commission</a> <del>Transportation Technology Office</del> staff <a href="#">and Commission Client</a> training, <del>and support, and cash flow model upgrades.</del>	December 2006
4.4 Contract Management <ul style="list-style-type: none"> <li>Progress Reports</li> <li>Final Report</li> </ul>	Monthly <a href="#">February 2008</a>
<a href="#">TASK 5 - The Contractor shall participate in two conferences, one in the first year of the contract (March 2006) and the one in the second year of the contract (October 2007).</a>	
5.1 Report on topic areas and conference content	January 2006 and August 2007
5.2 Report indicating speaker recruitment confirmation with transportation reimbursement confirmed.	January 2006 and August 2007
5.3 Report indicating focus group speakers confirmed with transportation reimbursement confirmed.	January 2006 and August 2007
5.4 Participation in Conference	March 2006 and October 2007
5.5 Contract Management <ul style="list-style-type: none"> <li>Progress Reports</li> <li>Final Report</li> </ul>	Monthly <a href="#">February 2008</a>
<a href="#">TASK 6 - The Contractor shall conduct two separate surveys and present the results of each at the annual conferences.</a>	
6.1 Non-petroleum niche market survey questionnaire	October 2006
6.2 Evaluate of non-petroleum niche market survey test and analysis	March 2007
6.3 Survey test results and written graphic report	June 2007
6.4 Report to the Commission on Test Results and Presentation at Transportation Conference	June 2007
6.5 Contract Management <ul style="list-style-type: none"> <li>Progress Reports</li> <li>Final Report</li> </ul>	Monthly <a href="#">February 2008</a>

### III. Proposal Format and Required Documents

#### ABOUT THIS SECTION

This section contains the detailed technical and mandatory Proposal format requirements. The format is prescribed to enable the State to evaluate each proposal uniformly and fairly. Format instructions must be adhered to, all requirements and questions in the RFP must be responded to, and all requested data must be supplied.

#### HOW MANY COPIES OF MY PROPOSAL DO I SUBMIT?

Mail or deliver an **original Proposal and eight (8) copies** to the address given in Section IV. Bidders must submit the technical qualifications and cost proposals in two separately sealed envelopes labeled Volume 1, Technical Proposal and Volume 2, Cost Proposal, for Request for Proposal #600-04-605. Bidders must also submit an electronic version of the technical and cost proposals in a format compatible with Microsoft Word.)

#### WHAT IS THE REQUIRED FORMAT?

##### Volume 1

The following topics constitute the mandatory order of presentation for a Proposal. Two-sided copying is preferred:

##### Section 1—Administrative Response

- Cover Letter
- Table of Contents
- Required Administrative Forms
  - ✓ Contractor Status Form
  - ✓ Small Business Preference Certification letter (if applicable)
  - ✓ Completed Disabled Veteran Business Enterprise forms
  - ✓ Certification Clauses Package

##### Section 2—Technical Response

- Summary of Approach to Tasks in Work Statement
- Team Qualifications and Relationships
- Team Member Experience and Capabilities
- Team Organizational Chart
- Prime Contractor Experience
- Personnel Experience and Qualifications (including resumes)
- Previous Work Products
- References
- Answers to Hypotheticals



### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

#### **Volume 2 – Cost (Sealed Separately)**

- Cost Summary Letter
- General Requirements
- Exhibit B-1, Contract Task Budget Summary
- Exhibit B-2, Schedule of Deliverables and Due Dates
- Exhibit B-3, Contractor Fee Calculation
- Exhibit B-4, Rates
- Exhibit B-5, Travel, Equipment, Materials, and Misc. List

#### **VOLUME 1 – SECTION 1, ADMINISTRATIVE RESPONSE**

##### **COVER LETTER**

Each Bidder shall submit a cover letter on company letterhead that includes:

- A reference to: “REQUEST FOR PROPOSAL, No. 600-04-605”;
- Summary of the Bidder’s ability to perform the services described in the Work Statement; and,
- Statement that the Bidder is willing to perform those services and enter into a contract with the State.

The cover letter must be signed by a person having the authority to commit the Bidder to a contract. If the Bidder claims a Small Business Preference, a statement to that effect shall also be included in the cover letter.

##### **TABLE OF CONTENTS**

Each Proposal must include a Table of Contents, organized in the order cited above and include corresponding page numbers.

##### **REQUIRED ADMINISTRATIVE FORMS**

Every Bidder must complete and include the following forms with their proposal:

- Contractor Status Form, Attachment 1
- Small Business/Disabled Veteran Business Enterprise Application

When claiming a small-business preference, the Bidder may include a copy of the approved certification letter or application for certification. Government Code Section 14835, et seq., requires that a five-percent preference be given to Bidders who qualify as a small business. See Attachment 2.1 for instructions.

### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

- Disabled Veteran Business Enterprise (DVBE) forms in Attachments 2.2. (Bidders who are government entities are exempt from this requirement).
- Contractor Certification Clauses, Attachment 3

## **VOLUME 1 – SECTION 2, TECHNICAL RESPONSE**

Volume 1, Section 2, shall summarize the Bidder's overall approach in completing the tasks outlined in the Work Statement, highlighting any outstanding features and qualifications relevant to performing the required work.

The information in this Section will be used to evaluate your company's approach to the Work Statement. When requested, identify the specific technical staff, the word processing technicians, and the administrative staff who will be directly involved in a contract management task. Exclude anyone whose responsibilities are minimally or indirectly associated with the contract, e.g., the receptionist, the mail room clerk or the security guard.

### **SUMMARY OF APPROACH TO WORK STATEMENT TASKS**

Describe the Bidder's approach to providing services listed in the Work Statement, highlighting any outstanding features, qualifications and experience relevant to performing the duties described in the Work Statement.

### **TEAM QUALIFICATIONS AND RELATIONSHIPS**

Identify and describe the prime contractor (organization/company) and briefly describe each organization on the team, including subcontractors (DVBEs, if applicable), highlighting any special expertise that will be utilized in achieving the project objectives outlined in the Work Statement. Describe the strengths of your organization including accomplishments and past outreach efforts relevant to this project.

### **TEAM MEMBER EXPERIENCE AND CAPABILITIES**

Describe all technical and professional staff members that will be assigned to this project. Clearly define which team members will work on each task area outlined in the Work Statement. Indicate how all team members are qualified to perform the proposed work, showing previous relevant work. Provide the title or classification of each significant team member as it applies to this project, and specify his/her roles and functions that will be utilized for this project. Provide resumes for each team member who will be working on this project including current job classification, education, professional experience, and areas of responsibility in each member's organization. List the availability of each individual by person hours and percentage of time that person will be assigned to each task.

Give examples of each company's experience in performing work within the past 48 months in each of the task areas listed in response to the paragraph above. Explain the relevance of this prior work to the Work Statement and the proposed contract.

### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

Describe how your team's expertise will be used to provide the technical support for the work described in this RFP highlighting any special expertise that will be utilized in achieving the project objectives outlined in the Work Statement.

Identify the individual who will oversee and manage the proposed project. State how the project manager has demonstrated capabilities to manage the work proposed, providing at least one example of a similar project managed by that individual.

#### **TEAM ORGANIZATIONAL CHART**

Provide an organizational chart that shows the Prime Contractor and the members of the contractor team and the relationships within each firm/company (including subcontractor and DVBE companies). Identify the primary persons responsible for the interface between the Prime Contractor and the Commission, and between each proposed subcontractor and the Prime Contractor. Explain the relationship of each technical staff to the organization of the rest of your company. Describe reliability, continuity, professional awards, location of the Bidder, and subcontractors, including DVBE's.

Include type of organization, composition, functions to be performed by employees of the Bidder, subcontractors or DVBE's and how they pertain to this contract.

Most of the work will involve coordination with the Commission's Sacramento Office. Describe where your company staff and each subcontractor's staff will be headquartered. Describe how you propose to minimize costs to the State while providing technical work under this contract.

#### **CONTRACTOR EXPERIENCE**

Describe the Contractor's experience as a lead, general or prime within the past 48 months and explain why your firm is qualified to perform the duties of a prime Contractor as outlined in Task 1 of the Work Statement.

Identify the individual who will oversee and manage the proposed project. Explain how the project manager has demonstrated capabilities to manage the work proposed, providing at least one example of a similar project managed by that individual.

#### *Timeliness*

Bidders shall describe their ability to support contract requirements in a timely manner. This includes showing how the Contractor will ensure efficient and timely completion of work tasks. All work-related costs and delays to be incurred by company offices outside of California must be identified. If more than one California office will be involved in any aspect of this contract, those office and staff resources must be identified. If work is to be performed by offices outside of California, explain its impact on administrative and total project cost and timeliness.

### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

Unless it is clearly demonstrated to have no adverse effect on the cost to the state in terms of efficiency or additional expense, work incurred outside of California will result in a lower score for this category. Also describe the Contractor's experience in developing cost effective methods for handling contract management assignments (i.e., how the task assignment and follow-up processes can be streamlined to allow for more efficient and expeditious handling of all work undertaken through this contract).

#### **PERSONNEL EXPERIENCE AND QUALIFICATIONS**

Describe all technical and professional staff members that will be assigned to this project. Clearly define which personnel will work on each task area outlined in the Work Statement and how all personnel are qualified to perform the proposed work, showing previous relevant work.

Provide the title or classification of each significant personnel member as it applies to this project, and specify his/her roles and functions that will be utilized for this project. Provide resumes for each personnel member who will be working on this project including current job classification, education, professional experience, and areas of responsibility in each member's organization. List the availability of each individual by person hours and percentage of time that person will be assigned to each task.

#### **PREVIOUS WORK PRODUCTS**

Describe and provide at least one example of a similar study that demonstrates successfully completed relevant work by your organization or team that includes:

- Study objectives.
- How the target markets were identified and characterized.
- How testing was developed, tested and refined.
- Marketing strategies and creative approaches.
- How the study was implemented.
- How the effectiveness of the study was evaluated.

#### **REFERENCES**

Bidders must provide a list of at least four (4) clients or employers who have received similar services from the Bidder or the Bidder's personnel or subcontractors, during the last three (3) years by completing Attachment 4, "Customer References". Such services should be of comparable complexity to the services requested in this RFP. Complete one customer reference form for each company.

All references must include the name and telephone number of a contact person with the contacting organization. These individuals, as well as others, may be contacted by the Commission when reviewing the submitted proposals. Final evaluations filed with the State on Bidder's past contract performance may be reviewed; therefore, the Bidder may wish to discuss any disagreements he/she has with those evaluations.

### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

#### **HYPOTHETICAL QUESTIONS**

Each bidder may apply for each individual task or the entire RFP. If the bidder decides to apply for only one task, the bidder is only required to respond to the hypothetical for that individual task. If the bidder decides to apply for more than one task or the entire RFP, the bidder will be required to respond to the hypotheticals for all of the tasks that the bidder applies for.

Task 1:

The Commission Contract manager contacts you about a compressed natural gas (CNG) fuel site compressor problem, and the facility has been out of service for more than one week. As the Contractor, what steps would you take to assist the site operator in getting the system back in operation?

Task 2:

Seven CNG fueling locations are experiencing distinct yet common problems. Each of these facilities was developed by different contractors. The Commission would like to develop a handbook as a tool for infrastructure developers while installing and/or manufacturing CNG systems. How would you go about developing this handbook? Please provide the steps you would take and include an outline, table of contents, an executive summary and graphics.

Task 3:

The Commission Contract Manager contacts you about a local government non-petroleum infrastructure project that is having difficulty with funding. The local government no longer has cost-share funds available. What steps would you take to assist the local government in obtaining funds so they can continue with the project?

Task 4:

The Commission needs a model to assist the public and private sector in non-petroleum infrastructure development. What steps would you take to develop a model that would determine the viability of a candidate for a non-petroleum infrastructure project? Please provide a simplified sample of a transportation technology spreadsheet.

Task 5:

Commission staff has been directed to hold a conference with the public and private sectors regarding non-petroleum fuel market niches. How would you assist Commission staff in developing the topics for this conference, recruiting a keynote speaker and panel members?

Task 6:

Commission staff will be holding a public and private sector conference on market niches. For this conference, staff needs to survey trash hauling companies that use CNG and LNG vs. diesel

### III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED

fuel. How would you go about developing a survey for this function? What factors and questions are necessary to evaluate this particular market niche? Finally, this survey needs to determine the factors that motivate the trash industry to use CNG and LNG.

## VOLUME 2—COST

### COST SUMMARY LETTER

The RFP response shall state the Bidder's costs for carrying out the project as outlined during the period of the contract. The costs must be displayed using a cost cover letter on the organization's letterhead.

### GENERAL REQUIREMENTS

The Contractor must submit information on all the Exhibit B Budget forms and will be deemed the equivalent of a formal bid submission under the Public Contract Code. Rates and personnel shown must reflect rates and personnel you would charge if you were chosen as the contractor for this RFP.

The total cost for each task shall include all costs and expenses incurred by the contractor and subcontractors, if any. There will be no additional payments of any kind. In order to show how Bidders calculated task cost, Bidders must provide a detailed budget for each task listed in Exhibits B-1 through B-5 for this project, so the Commission can evaluate reasonableness of task budget.

Provide a detailed budget for each task and product for this project. Describe how you will minimize travel costs (if located out of Sacramento region). Provide the total cost of the project, with a breakdown showing how the cost was determined and method of payment. Dedicated word processing and other clerical support hours to be provided by clerical staff must be shown separately from hours calculated for project management, research, and other professional work.

The Contractor shall be reimbursed for each task in the work statement in accordance with the provisions of the contract budget. Costs must be incurred within the term of the contract. The Commission will accept a federal government audit of general and administrative, overhead, and labor rates. Proof must be provided in the proposal to support your rates. **When preparing these forms, be sure to take into consideration the length of the project and take into account increases in salaries and wages, general and administrative, overhead, etc.**

**The rates quoted in the Cost Proposal will become a part of the final contract and will not be changed during the term of the contract. The entire term of the contract and projected rate increases must be considered when preparing the budget. The hourly rates bid are considered capped and shall not change during the term of the contract.**

Bidders should note that in addition to names and hourly rates presented in the Cost Proposal, the technical qualifications must contain the resumes of all individuals working on projects.

### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

Individual names, corresponding hourly rates, and proposed hours will be struck from the cost Proposal for resumes missing in the technical qualifications.

The following is a list of items that must be included in your project cost:

- Bidder's Direct Labor - List name, classification, and rate per hour and number of hours by task.
- Subcontractors/Consultants – Name, Technical Specialty, rate per hour/day, and number of hours/day by task.
- Travel and per diem - Identify destinations, number of trips, and cost per trip. Travel expenses incurred will be reimbursed at no more than the State per diem rates for non-represented State employees, and must be included in the Bidder's cost. Receipts for lodging are required and subject to the Commission Contract Manager's approval.
- Supplies/Equipment costs specifying equipment to be bought and the disposition of equipment at the end of the contract.
- Information Technology - Cost for machine time – such as cost of computer use (batch mode or time-share) and data entry. Unallowable Costs: expenditures for computers, computer equipment – purchased or leased, software – purchased or leased, and application-development services.
- Fringe benefit costs citing actual benefits or a percentage of personal services costs.
- Overhead Rate - List basis of application and all items charged in overhead
- General and Administrative - List basis of application
- Fee (not allowed on subcontractors invoices)
- Identify any Disabled Veteran Business Enterprise by task and dollar amount.
- Other specific breakdown required.

#### **CONTRACT TASK BUDGET SUMMARY, B-1**

These are the total project costs by task, and will be used in the final contract.

#### **SCHEDULE OF DELIVERABLES AND DUE DATES, B-2**

For each task, insert the planned start and completion dates. Programs awarded under this RFP are currently planned to start no earlier than July 1, 2005. Thus, pick a start date of July 1 or later, and fill in the remaining dates, accordingly.

#### **CALCULATION OF FRINGE BENEFITS, OVERHEAD, GENERAL ADMINISTRATIVE EXPENSES, AND PROFIT RATES, B-3**

Using Exhibit B-3, provide overhead, G&A and profit rates (%). Different types of overhead (e.g., direct overhead and indirect overhead) may be combined in a single column if they are applied to the same items. Profit cannot exceed 10%. Change the column headings, if appropriate, to match your chart of accounts.

List items you include in each category (Fringe Benefits, Overhead, and G&A).

### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

Show the formulas you use to calculate billable charges for the columns listed in the detailed Budget sheets. The Contractor may not apply profit to subcontractor invoices, nor may subcontractors apply profit to sub-subcontractor invoices.

#### **DIRECT LABOR BY TASK, B-4**

In the first column, "Names/Job Classification - Title," list the names of people who will be conducting the work under this Agreement. If the names are not known, then list the job classification or title (e.g., Graduate Student).

Insert the amount of Commission funds budgeted per task for each of the Names/Job Classifications listed.

#### **TRAVEL, EQUIPMENT LIST, MATERIALS LIST, AND MISCELLANEOUS EXPENDITURES, B-5**

The Contractor and all Subcontractors must provide details of "Travel," "Equipment," "Materials," and "Miscellaneous," listed in Exhibit B-6. Task numbers must be entered for all items on each table. Include any meetings, and the final meeting. Also include any other trips that you can identify. Any trips not identified here will need prior written approval by the Commission Contract Manager. Along with the purpose, include the destination, person or people taking the trip, and the amount for each trip.

#### **EQUIPMENT**

List equipment that will be purchased partly or in full with Commission funds. Include the name, a description, the purpose and the amount of each piece of equipment. Anything that costs more than \$5,000 and has a useful life of more than 1 year is considered equipment. If possible, funds other than those from the Commission should be used to purchase equipment. Equipment purchased partly or fully with Commission funds will be listed on a UCC.1 form that will be filled out by a Commission Contracts Office prior to the start of the Agreement.

#### **CONTRACT PAYMENTS**

The Bidder is required to provide, as part of the proposal response, Exhibit B-1 through B-5 specifying the tasks and deliverables upon which payments will be based. The Bidder must describe in the tasks to be performed, the associated deliverables that will be provided, and the cost for each task. The tasks and deliverables must correspond to the Project Tasks and Deliverables required under the Work Statement.

In consideration for the contract work, the Commission may make payments on the following conditions:



### **III. PROPOSAL FORMAT AND REQUIRED DOCUMENTS, CONTINUED**

1. No payment in advance of services rendered, and not more frequently than one payment a month.
2. Receipt of a deliverable and progress report.
3. Approval of the deliverable or progress report by the Commission Contract Manager.

## IV. ADMINISTRATIVE REQUIREMENTS

### WHAT IS AN RFP?

The competitive method used for this procurement of services is a Request for Proposal (RFP). A Proposal submitted in response to this RFP will be scored and ranked based on the criteria in Exhibit A. Every Technical Proposal must establish in writing the Bidder's ability to perform the RFP tasks listed in the Work Statement. The Commission will contract with the Bidder who satisfies the administrative requirements, and technical criteria.

### HOW ARE KEY WORDS DEFINED?

Important definitions for this RFP are presented below:

Word/Term	Definition
State	State of California
DGS	Department of General Services
Commission	California Energy Commission
RFP	Request for Proposal, this entire document
Proposal	Formal written response to this document from contractor
Bidder	Respondent to this RFP

### CONTRACTOR DEFINITION

The Contractor is defined as the firm that receives the contract for specific tasks from the Commission as a result of this RFP and shall be referred to as the "Contractor" in this RFP. The Contractor has primary and legal responsibility for all of the work within the Work Statement, is an expert in all of the management and administration areas, may be an expert in one or more of the task areas, and manages the work of the entire contract team.

### SUBCONTRACTOR DEFINITION

A subcontractor is defined as a firm or individual expert or consultant with financial/technical expertise to supplement the Contractor's expertise. The Contractor in conjunction with the subcontractor team is referred to as the contractor team. The Commission reserves the right to use some or all of the subcontractors belonging to the Contractor team, and to remove, approve and/or designate additional subcontractors during the contract term.

### WHEN IS THE DEADLINE FOR QUESTIONS ABOUT THIS RFP?

Potential Bidders may ask questions about the requirements of this RFP. Bidders must prepare their questions in writing and send or FAX them to the Contact Person. Questions will be answered in writing and distributed to recipients of the RFP. **The deadline for written questions is February 15, 2005.**

## IV. Administrative Requirements, Continued

### WHAT IS THE DEADLINE FOR SUBMITTING PROPOSALS?

All copies of your proposal must be delivered to the Commission Contract Office by **March 18, 2005, 5:00 p.m.**

#### NOTE

In accordance with Public Contract Code 10344, the Commission will **not** accept late Proposals (delivered after 5:00 p.m.). There are no exceptions to this law.

### HOW DO I DELIVER MY PROPOSAL?

A Bidder may deliver a Proposal by:

- U. S. Mail;
- In person; or
- Messenger service.

All Proposals must be **delivered** to the Commission's Contracts Office by 5:00 p.m. on March 18, 2005. If a Bidder chooses either of the last two methods, delivery of all copies prior to 5:00 p.m. on March 18, 2005, must be made during normal business hours of 8:00 a.m. – 5:00 p.m., Monday through Friday. E-mail and facsimile (FAX) transmissions **WILL NOT** be accepted in whole or in part under any circumstances.

### WHERE DO I DELIVER MY PROPOSAL?

California Energy Commission  
1516 Ninth Street, 1<sup>st</sup> Floor  
Contracts Office, MS-18  
Sacramento, California 95814

### HOW MANY COPIES DO I SUBMIT?

Mail or deliver an **original Proposal and eight (8) copies** to the address given above. Bidders must submit the technical and cost proposals in two separately sealed envelopes labeled Volume 1, Technical Proposal and Volume 2, Cost for Request for Proposal #600-04-605. Bidders must also submit an electronic version of the technical and cost proposals in a format compatible with Microsoft Word.)

### ARE THERE IMPORTANT ADMINISTRATIVE DETAILS I SHOULD KNOW?

#### Bidders' Cost

The Bidder is responsible for the cost of developing a proposal, and this cost cannot be charged to the State.

#### Drug-Free Workplace

The successful Bidder(s), by signing the final contract, certifies compliance with California Government Code Section 8350 et seq., which relates to providing a drug-free workplace.

## IV. Administrative Requirements, Continued

### Americans With Disabilities Act

The successful Bidder(s), by signing the final contract, certifies compliance with the Americans with Disabilities Act (ADA) of 1990, (42 U.S.C. 12101 et seq.) which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to the ADA.

### Recycled Paper and Products

The successful Bidder(s) shall certify in writing the minimum, if not exact, percentage of recycled content of paper used in the performance of the contract, regardless of whether the product meets the required recycled product percentage defined in Section 12161 and 12200. The successful Bidder(s) may certify that the product contains zero recycled content. (PCC § 10308.5).

## **IS DISABLED VETERAN BUSINESS ENTERPRISES (DVBE) COMPLIANCE REQUIRED?**

Yes. A Short Explanation of the DVBE Process – If you are a non-governmental entity, you must have either three percent DBVE participation, **or** you must demonstrate a good faith effort to obtain DVBE participation. It is important that you thoroughly read the instructions provided on DVBE Form 3. The DVBE compliance process is as follows:

Option A – Commitment to full DVBE Participation – For a Bidder who is a DVBE or who is able to meet the commitment to use identified DVBE(s) to fulfill the full DVBE participation goal.

Option B – Good Faith Effort – For a Bidder documenting its completed effort, made prior to the Bid due date, to obtain DVBE participation that may result in partial or no DVBE participation.

Bidders must provide, prior to contract award, for each DVBE subcontractor, a written agreement signed by the Bidder and proposed DVBE subcontractor(s). The written agreement will include:

- DVBE Scope of Work
- Term of intended subcontract with DVBE
- Rate and conditions of payment
- Total amount of contract to be paid to the DVBE

## **WHAT IS THE REQUIREMENT FOR “COMMERCIALLY USEFUL FUNCTION” FOR CERTIFIED SMALL BUSINESS, MICROBUSINESS OR DVBE?**

A certified small business or microbusiness, or certified DVBE shall provide goods or services that contribute to the fulfillment of the contract requirements by performing a **commercially useful function**.

A certified small business, microbusiness or DVBE is deemed to perform a **commercially useful function** if it does all of the following:

## **IV. Administrative Requirements, Continued**

1. Is responsible for the execution of a distinct element of the work of the contract.
2. Carries out its obligation by actually performing, managing, or supervising the work involved.
3. Performs work that is normal for its business services and functions.
4. Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a **commercially useful function** if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of small business, microbusiness or DVBE participation.

### **WILL THE SMALL/MICRO BUSINESS PREFERENCE BE APPLIED?**

Yes. Each Bidder who is a State certified small/micro business will receive a cost preference of five percent of the lowest cost or price offered by the lowest responsible Bidder who is not a certified small/micro business, by deducting this five percent from the small/micro business Bidder's cost, for the purpose of comparing costs for all Bidders.

#### Non-Small Business Preference

The preference to a Non-Small Business Bidder that commits to Small Business or Microbusiness subcontractor participation of (25%) of its net bid price shall be (5%) of the highest responsive, responsible Bidder's total score. A Non-Small Business which qualifies for this preference may not take an award away from a certified Small Business. The Small Business or Microbusiness must perform a commercially useful function. A copy of prime contractor's subcontract with a certified Small Business or Microbusiness must be provided before award of contract.

#### A Certified Nonprofit Veteran Service Agency (NVSA) Small Business Certification

NVSAs can qualify for California Small Business certification through the Department of General Services (DGS), Procurement Division, Office of Small Business and DVBE Certification. Small Business/NVSAs participating as a prime Bidder are eligible for application of the (5%) Small Business bidding preference when they meet bid standards including:

- Determined to be a responsible Bidder that submitted a timely responsive bid, and
- Indicated in the bid eligibility for the preference.

### **CAN I USE SUB-CONTRACTORS?**

Yes. Any subcontractors the Bidder chooses to use in fulfilling the requirements of this RFP, that are expected to receive more than ten percent (10%) of the value of the contract, must also meet all administrative and technical requirements of this RFP. The Bidder must provide a summary of each subcontractor's qualifications, including DVBE firms, experience and duties that would be performed under the Work Statement.

## **IV. Administrative Requirements, Continued**

Also, for all DVBE firms regardless of the amount they receive, Bidders must provide a summary of the DVBE's qualifications, experience and duties that would be performed under the Work Statement. The summary shall contain the information requested in, and format required by, Section IV. DVBE cost information must also be included in the Cost Proposal.

The Contractor is responsible for the quality of all subcontractor work, and may only replace subcontractors as specified under the terms of the contract.

### **HOW DO I RESPOND TO THIS RFP?**

Responses to this solicitation will be in the form of a Technical and Cost Proposal according to the format described in Section III. The Technical Proposal shall document the Bidder's experience, qualifications, project organization and approach to perform the tasks described in the Work Statement found in Section II, and the Cost Proposal shall detail the Bidder's budget to perform such tasks.

### **CAN THE COMMISSION CANCEL THIS RFP?**

Yes, if it is in the State's best interest, the Commission reserves the right to do any of the following:

- Cancel this RFP;
- Amend this RFP as needed; or
- Reject any or all Proposals received in response to this RFP

### **CAN THE COMMISSION AMEND THIS RFP?**

If the RFP must be amended, the Commission will mail a formal written addendum to all parties who requested the RFP and will also post it on the Commission's Website <[www.energy.ca.gov/contracts](http://www.energy.ca.gov/contracts)> and Department of General Services' Website <[www.dgs.ca.gov/cscr](http://www.dgs.ca.gov/cscr)>.

#### Errors

If a Bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the Bidder shall immediately notify the Commission of such error in writing and request modification or clarification of the document. Clarifications will be given by written notice of all parties who requested the RFP, without divulging the source of the request for clarification. The Commission shall not be responsible for failure to correct errors.

### **WHAT ARE THE CONTRACT REQUIREMENTS?**

It is the Bidder's responsibility to read and understand the sample contract terms and conditions, Attachment B.

#### Term of the Contract

The term of the contract will be June 30, 2005 to March 31, 2008.

## **IV. Administrative Requirements, Continued**

### RFP in Final Contract

The content of this RFP shall be incorporated by reference into the final contract.

### Contract Cancellation

The Commission reserves the right to terminate any contract awarded through this RFP by providing 30-days notice to the successful Bidder.

### No Contract Until Signed & Approved

No agreement between the Commission and the successful Bidder is in effect until the contract is signed by the Contractor, approved at a Commission Business Meeting, and approved by the Department of General Services.

### Contract Amendment

The contract executed as a result of this RFP will be able to be amended by mutual consent of the Commission and the Contractor. The contract may require amendment as a result of project review, changes and additions, changes in project scope, or availability of funding.

### Audit

The Bureau of State Audits may audit a contract awarded under this RFP for a period of three years after the final payment or termination of the contract.

## **WHAT IF I DECIDE TO MODIFY OR WITHDRAW MY PROPOSAL?**

A Bidder may, by letter to the Contact Person at the Commission, withdraw or modify a submitted Proposal before March 18, 2005, at 5:00 p.m. Proposals cannot be changed after that date and time. A Bidder cannot withdraw after that date for Proposals without the concurrence of the Commission. A Proposal cannot be “timed” to expire on a specific date. For example, a statement such as the following is non-responsive to the RFP: “This proposal and the cost estimate are valid for 60 days.”

## **CAN MY PROPOSAL CONTAIN CONFIDENTIAL INFORMATION?**

No. The Commission will not accept or retain any Proposals that are marked confidential in their entirety and Bidders are strongly discouraged from requesting confidential treatment for any of the information contained in a submittal.

## **HOW DO I KNOW IF I’VE BEEN AWARDED A CONTRACT?**

Subsequent to the Proposal evaluations, the Commission will post a “Notice of Proposed Award” at the Commission’s headquarters in Sacramento, and on the Commission’s Web Site, on or about April 14, 2005, after 12:00 noon at:

California Energy Commission  
Contracts Office  
1516 Ninth Street, MS-18  
Sacramento, CA 95814

## **IV. Administrative Requirements, Continued**

A contract will be awarded to the Bidder who satisfies all the administrative and technical requirements and who provides

### **WHAT HAPPENS TO MY DOCUMENTS?**

On the Notice of Proposed Award date all proposals and related material, with the exception of work examples, submitted in response to this RFP become a part of the public record and are available for public disclosure. Bidders who want any work examples they submitted with their proposals returned to them shall provide either sufficient postage, or a U.P.S. or Courier Charge Code. If adequate postage or a charge code is not provided for as mentioned above the documents will be destroyed.

### **NONDISCRIMINATION CERTIFICATION**

Any bid, proposal, or offer for a contract which is submitted by a contractor who has been decertified from contracting with the State by the Department of Fair Employment and Housing (DFEH), shall be deemed to be non-responsive. Refer to the California Notice Register for a list of decertified contractors. (Published by the Office of Administrative Law and available through the Office of State Printing).

### **COMMISSION ISSUED RFP**

The California Energy Commission has issued this RFP on behalf of the State of California. The Commission is the sole point of contact concerning this RFP. The Contact Person for questions is:

ELIZABETH STONE, CONTRACT OFFICER

Telephone: (916) 654-5125

FAX: (916) 654-4423

### **BIDDERS' ADMONISHMENT**

This RFP contains the instructions governing the requirements for a firm quotation to be submitted by interested Bidders, the format in which the technical information is to be submitted, the material to be included, the requirements which must be met to be eligible for consideration, and Bidder responsibilities. Bidders must take the responsibility to carefully read the entire RFP, ask appropriate questions in a timely manner, submit all required responses in a complete manner by the required date and time, make sure that all procedures and requirements of the RFP are followed and appropriately addressed, and carefully reread the entire RFP before submitting a proposal.

### **ON WHAT GROUNDS WOULD MY PROPOSAL BE REJECTED?**

A Proposal shall be rejected if:

- It is received after the exact time and date set for receipt of Proposal's pursuant to Public Contract Code, Section 10344.



## **IV. Administrative Requirements, Continued**

- It is considered non-responsive to the California Disabled Veteran Business Enterprise participation requirements.
- It is lacking a properly executed Certification Clauses, Attachment 3.
- It contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Bidder.
- The Proposal is intended to erroneously and fallaciously mislead the State in its evaluation of the Proposal and the attribute, condition, or capability is a requirement of this RFP.
- There is a conflict of interest as contained in Public Contract Code Sections 10410, 10411 and/or 10365.5.

A Proposal may be rejected if:

- It is not prepared in the mandatory format described.
- It is unsigned.
- The firm or individual has submitted multiple proposals for each task.
- It does not literally comply or contains caveats that conflict with the RFP and the variation or deviation is not material, or it is otherwise non-responsive.
- The Commission may waive any immaterial defect or deviation contained in a Bidder's proposal. The Commission's waiver shall in no way modify the proposal or excuse the successful Bidder from full compliance.

### **WHAT ARE THE PROTEST PROCEDURES?**

A Bidder may file a protest against the proposed awarding of a contract. Once a protest has been filed, contracts will not be awarded until either the protest is withdrawn, or the Commission cancels the RFP, or the Department of General Services decides the matter.

Please note the following:

- Protests are limited to the grounds contained in the California Public Contract Code Section 10378.
- During the five working days that the Notice of Proposed Award (NOPA) is posted, protests must be filed with the DGS Legal Office and the Commission Contracts Office.
- Within five days after filing the protest, the protesting Bidder must file with the DGS and the Commission Contracts Office a full and complete written statement specifying the grounds for the protest.
- If the protest is not withdrawn or the solicitation is not canceled, DGS will decide the matter. There may be a formal hearing conducted by a DGS hearing officer or there may be briefs prepared by the Bidder and the Commission for the DGS hearing officer consideration.

## **V. Evaluation**

### **ABOUT THIS SECTION**

This section explains how the proposals will be evaluated. It describes the evaluation stages, preference points, and scoring of all proposals. A Bidder's proposal will be evaluated and scored based on its response to information requested in Sections II and III.

During the evaluation and selection process, the Commission may interview a Bidder for the purpose of clarification and verification of information provided in the proposal.

### **HOW WILL MY PROPOSAL BE EVALUATED?**

To analyze all Proposals, the Commission will organize an Evaluation Committee whose members have expertise in evaluating consulting services. The Proposals will be analyzed in three stages:

#### Stage One: Fulfillment of RFP Mandatory Format

The Contracts Office will first identify those Bidders whose Proposals adhere to the required format outlined in Section III; Bidders who do not follow the required format or submit the required forms will be disqualified and eliminated from the competition.

#### Stage Two: Evaluation of Proposals

The Evaluation Committee will then evaluate and score all remaining Proposals based on the Evaluation Criteria Worksheets, Exhibit A. The Committee may, at its discretion, seek clarification of any point in the written technical proposal through a conference call with the affected Bidder. Those Bidders not attaining the minimum technical score of 300 points (75%), will not have their cost scores opened and will be eliminated from further competition.

#### Stage Three: Cost Proposal

Those proposals that pass the minimum technical points will have their cost proposal opened. The Small Business Preference will be applied, if applicable.

The contract will be awarded to the Bidder who met the minimum technical and administrative requirements and who has the lowest Final Cost when the Small Business preference (if applicable) is applied.

## **V. Evaluation Criteria, Continued**

### **DO SMALL BUSINESSES GET EXTRA POINTS?**

Yes. Each Bidder who is a State certified small business will receive a cost preference of five percent of the lowest cost or price offered by the lowest responsible Bidder who is not a certified small business, by deducting this five percent from the small business Bidder's cost, for the purpose of comparing cost proposals of all Bidders.

### **HOW WILL MY PROPOSAL BE SCORED?**

The Evaluation Committee will award points based on the following considerations. The point calculations reflect the averages of the combined scores of all Evaluation Committee members.

#### Fail (0 points)

Zero points are awarded for responses considered to be unacceptable, such as:

- Is not in substantial accord with the RFP requirements;
- Has a potential significant effect on the amount paid or net cost to the State or the quality or quantity of product and/or service;
- Provides an advantage to one competitor over the other competitors, for example, not paying minimum wages.

#### Minimally Acceptable (1-3 points) Below average response, such as:

- The proposal states a requirement, but offers no explanation of how or what will be accomplished;
- The response contains a technical deficiency which is an inaccurate statement or reference concerning the how, what, where, or when, which is part of an overall statement or description.

#### Meets Minimum Requirements (4-6 points) Average response, such as:

- Satisfies the minimum requirements and describes generally how and/or what will be accomplished.

#### Exceeds Minimum Requirements (7-9 points) Above average response, such as:

- Satisfies the minimum requirements and specifically describes how and/or what will be accomplished in an exemplary manner, using sample products and illustrative materials (i.e., diagrams, charts, graphs, etc.).

## **V. Evaluation Criteria, Continued**

Exceptional (10 points) Superior response, such as:

Exceeds the minimum requirements and specifically describes how and/or what will be accomplished both quantitatively and qualitatively, using sample products and illustrative materials (i.e., diagrams, charts, graphs, etc.).

### **CRITERIA AND POINTS**

The Evaluation Committee will review and evaluate the Proposals and interviews based on the Evaluation Criteria Worksheets. See Exhibits A-1 through A-6.

**RFP 600-04-605**  
**Request for Proposals for**  
**Non-Petroleum Technical Assistance**

**Questions and Answers**  
**Pre-Bid Conference – February 15, 2005**

**General Questions:**

**Q1: Could you please explain the funding issues. Is the \$30,000 for this fiscal year, or for how many fiscal years?**

A1: We have \$30,000 available now for this fiscal year. Additional funding will be allocated in future fiscal years and is dependent upon year by year state and federal budget approval. The budget is outlined on page 14 of the RFP.

**Task 2 Questions:**

**Q2: Does the budget include all printing and publication costs?**

A2: Yes, please refer to page 16, Task 2.7.

**Q3: What level of quality in printing does the California Energy Commission (Energy Commission) expect (number of colors, type of printing)? What quality of graphic design does the Energy Commission expect, and are all these costs included in the budget?**

A3: For each handbook we anticipate a two color, perfect bound, #80 cover with graphics and a glazed matte finish. Each handbook will include 25-50 pages, #24 of black and white text, graphics and tables. We require 1,000 copies of each handbook.

**Q4: Does the Energy Commission already have a set of projects in mind for profiles as “best practice” sites, or is the contractor expected to select the projects?**

A4: Energy Commission staff will develop profiles of projects we have funded in the past. There may be instances where we may need contractors to obtain information on one or more project types.

**Q5: Can the Energy Commission provide a list of all candidates or funding alternative fuel projects prior to the RFP deadline?**

A5: No, Energy Commission staff will decide the list of candidates after the contract is awarded.

**Q6: The Energy Commission expects that the first handbook, for the fuels/equipment industry, be produced with a budget of \$12,000. Does the Energy Commission feel that this is realistic? Might this be combined with the production of the market niche handbook over two years, so that there will be sufficient funding?**

A6: Yes, we feel that the budget is adequate because the total anticipated funding for both handbooks is \$36,000. We would like camera ready copies for each handbook. We are open to cost savings that might occur with the combined production of the handbooks.

**Q7: It appears that there is a significant degree of synergy among tasks 2, 3, and 6. Is the Energy Commission open to proposals of a combined budget, with linked deliverables and budgets across the tasks? If a contractor were to bid individually on tasks 2, 3, or 6, it seems as if they would be at a disadvantage by not leveraging the scale and interactions of the tasks. Does the Energy Commission concur in this assessment?**

A7: This RFP is designed to obtain the most qualified candidates for any single task. Therefore, the bidders can submit proposals for one or more tasks based on their capabilities. If a bidder offers multiple capabilities, they will be scored based on the selection criteria.

#### **Task 4 Questions**

**Q8: Who will own the rights to the cash flow model? Does the Energy Commission see an advantage for itself in owning the full and exclusive rights to the model?**

A8: The Contractor will own the model, but the Energy Commission will have life-time rights to model upgrades. The Energy Commission will also have the right to make the model available to our clients.

**Q9: How will the model upgrades be initiated or requested? In the form of work order/contract authorization?**

A9: The model enhancements/upgrades will be triggered by receipt of new data from actual projects collected by Energy Commission staff and covering the six non-petroleum fuel/technology categories listed on page 17, Task 4.2.

**Q11: Does the Energy Commission have a preference for an off-the-shelf versus a fully customized tool built to Energy Commission specifications? The \$28,000 proposed for development, testing and training for the model in the first year seems to indicate that only an off-the-shelf or an existing customized model can be realistically be delivered.**

A11: The Contractor shall develop a customized transportation technology cash flow model. The total budget for model development, testing, enhancement and training is \$58,000.

# PRE-BID CONFERENCE

February 15, 2005, 10:00 a.m.

For

**RFP #600-04-605**

**NON-PETROLEUM TECHNICAL ASSISTANCE**

VOLUNTARY SIGN-IN: You are not required to sign this sheet or provide any information as a condition for attending or participating in this meeting. However, if you want to receive notices of future meetings on today's topics, or be identified as a small or disabled veteran business enterprise, please provide the requested information in the spaces below

**\*\*Please use black or blue ink only\*\***

NAME AND COMPANY	ADDRESS, PHONE NUMBER	E-MAIL ADDRESS	SMALL	DISABLED VETERAN OWNED BUSINESS
Mike Jackson, TIAX	1601 S. DeAnza Blvd, Cupertino, CA 95014 (408) 517-1560	<a href="mailto:Jackson.michael@tiaxllc.com">Jackson.michael@tiaxllc.com</a>	N/A	N/A
Patti Kroen, Kroen/RCC	P.O. Box 1106, Davis, CA 95617 (530) 297-1887	<a href="mailto:pkroen@pacbell.net">pkroen@pacbell.net</a>	Yes	Woman Owned
Charles Powars, SDV/SCC	205 DeAnza Blvd., Suiote 26, San Mateo, CA 94402 (650) 358-9522	<a href="mailto:bewing@attglobal.net">bewing@attglobal.net</a>	Yes	Yes